

## Must-do Tips No 87 - Winning By Example

### How to prove that yours is the firm that the client should buy - in particular, when they have never used you before?

Evidence provided by referees might help, but there's no guarantee that it will be taken up. So proposals or pitch documents can end up peppered with claims that go largely unsubstantiated - and, therefore, that are in danger of being perceived by the client as "mere puffery" (e.g. "we are innovators in our field").

Case studies are an excellent way to provide such evidence and can really differentiate you...IF they are done well. This month we offer three quick things to remember when producing a winning case study.

### Tip 1 – story tell (not document graft)

In producing a case study, your primary aim is to *tell a story* in an interesting, snappy, and engaging way. This is not just a blinding statement of the obvious, because many professionals try to translate the everyday "style" they use to draft a watertight contract or produce a learned, authoritative article. So the results can end up being distinctly unengaging and counterproductive. Either find someone who can write good stories for you, or at least get your version "sense checked" by a non-technical third party (perhaps a Marketing or Business Development colleague).

### Tip 2 – deliver on the whats and the whys

Content-wise, the story must focus concisely on three key things - WHAT was the challenge faced by the client (i.e. the situation and context); WHY the firm's help was needed; and WHAT you did to assist and make a difference. Concentrate on these whats and whys - no more, no less.

### Tip 3 – which means that...

The final and most important bit often gets missed out: the pay-off. By which we mean - the **benefits** that were delivered to the client from the firm's input, linking these directly to the claims you are making. By doing this, you "join the dots" properly for the reader.....and mere puffery will disappear into the ether.

Producing convincing case studies is included in a series of three workshops we offer that cover all the key elements of the pitching or tendering process for professional firms. These form part of a suite of over 20 workshops on the important aspects of **Business Development, Client Relationship Management** and **Leadership & Management**. To find out more, just go to <http://www.peoplescope.com/training-programme.php>.



In addition, we have a wide selection of previous issues of Must-do Tips offering practical, real world advice at <http://www.peoplescope.com/must-do-tips.php>, plus in-depth articles on the key commercial issues for professional firms at <http://www.peoplescope.com/articles.php>. All these are free to access.

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Best regards.

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